Assessment Appeal Electronic Application Submission Process

The Assessment Appeals process allows owners of real and personal property to dispute the value assigned to their property by the Assessor's Office, and provides an opportunity to present evidence in an informal hearing to either an Assessment Appeals Board or a Hearing Officer.

After hearing testimony from the property owner/agent and the Assessor's representative, the Appeals Board or Hearing Officer renders a judgment on the value of the property.

This document will provide assessment appeal applicants with step by step instructions on how to complete and submit an assessment appeal application electronically via the San Bernardino County, Clerk of the Board Assessment Appeals website (http://www.sbcounty.gov/assessmentappeals/).

Process Step	Description	
<u>Step 1</u>		
Select the desired Appeal Type by clicking on the pertinent appeal application link	APPEAL TYPE REGULAR ASSESSMENT (a) So known as Opcline in Value) Decline in Value) Description A regular assessment occurs annually and is reflet Assessor's valuation of property on the tax bill. Prilie this type of appear if you believe the value of property as of January 1 of the current year is less assessed value on the tax bill.	November 30 of complete and electronically
	SUPPLEMENTAL ASSESSMENT A supplemental assessment occurs when propert reassessed due to change in ownership (such as of a new home) or new construction (such as add bedroom). File this type of appeal if you believe the supplem assessment was inhalted in error and/or the asse is inaccurate.	purchase mailing date or postmark date on the Notice of Supplemental sental mailing date or postmark date on the Notice of Supplemental Assessment Appeal
	An escape assessment occurs when events takin prior years (such as new construction) were held a timely manner by the Assessor. Upon discover Assessor reassesses the property and issues a landle Enrollment of Escape Assessment. File this type of appeal if you believe the escape a was initiated in error and/or the assessed value is	iscovered in mailing date or the postmark date or the Notice of the Notice of Ernollment of Escape Sessessment Appeal Click here for
	A calamity assessment occurs when a natural discuss as flood or fire) or other misfortune damage property. The Assessor revalues your property an Notice of Supplemental Assessment. File this type of appeal if you believe the assessment was conducted in error and/or the value is inaccurate.	saster Within 6 month of mailing date on Notice of Supplemental Assessment October 1 Supplemental October 1 Suppleme

Step 2 *Note: Assessor's Parcel Number must be 13 digits, all numeric with the exception of the 10th position, which may be an alpha character. On the **Parcel Information** screen you will need to: Click on the Assessor's Parcel Number field and type in the parcel number · (REQUIRED) <u>Parcel</u> **Parcel Information** Select the parcel number <u>Applicant</u> Assessor's Parcel Property type by clicking on the Number Facts Secured or Unsecured radio Secured / Secured Oursecured Unsecured? button Roll Year (*Note: Screen will default to UNSECURED) Click on Roll Year field and type in the Assessor Roll Next Year being appealed (OPTIONAL) Click on **NEXT** button to proceed to the **Applicant Information** screen

Step 3

On the **Applicant Information** screen you will need to:

Click on **Last** and **First Name** or **Business Name**fields and type applicant's name
(*REQUIRED*)

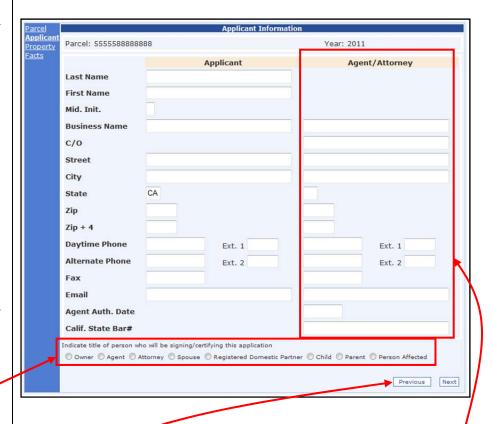
Click on **Business Name** field and type applicant business name (*OPTIONAL*)

Click on **Street**, **City**, **Zip** and **Daytime Phone** number fields and type in applicant information (*REQUIRED*)

Select Title of Person signing/certifying the application (*REQUIRED*)

Click on **NEXT** button to proceed to the **Property Information** screen

To return to the **Parcel Information** screen, click on the **PREVIOUS** button

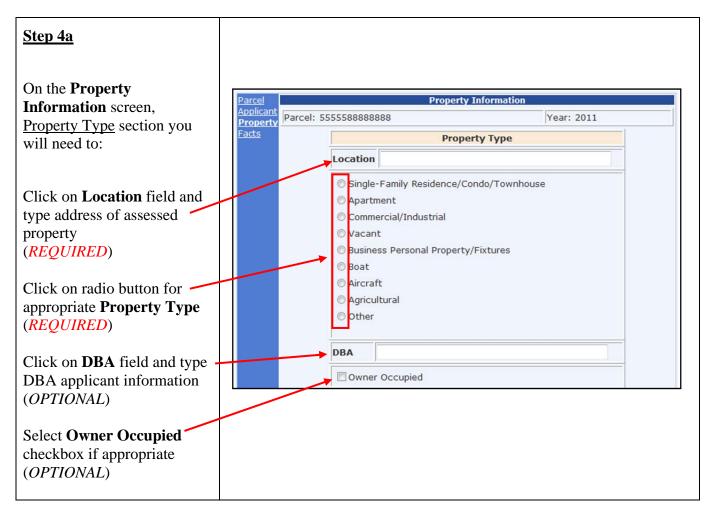


*Note 1: The Agent/Attorney column fields are optional, as not all applications are associated with an agent/attorney.

*Note 2: If the applicant Business Name field is provided in addition to the applicant name, the printed application will display the Business Name in the applicant name field.

Minimum Required Fields

- 1. Applicant Last Name, First Name and/or Business Name
- 2. Street, City, Zip and Day Time Phone Number
- 3. Title of Person signing/certifying application



Step 4b

On the **Property Information** screen,
property <u>Values</u> section you
will need to:

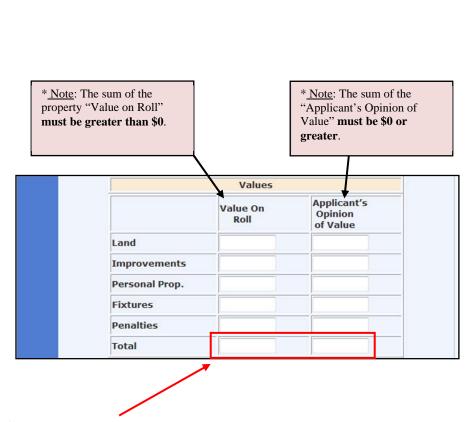
Click on **Land** fields and, *if applicable*, provide <u>Assessor</u> and <u>Applicant Opinion</u> values for assessed property

Click on **Improvements** fields and, *if applicable*, provide <u>Assessor</u> and <u>Applicant Opinion</u> values for assessed property

Click on **Personal Prop.** fields and, *if applicable*, provide <u>Assessor</u> and <u>Applicant Opinion</u> values for assessed property

Click on **Fixtures** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Click on **Penalties** fields and, *if applicable*, provide <u>Assessor</u> and <u>Applicant</u> <u>Opinion</u> values for assessed property



*Note: The total amounts in each column are calculated automatically as you enter values into the fields. Applicants may also <u>override</u> the calculated dollar amount totals in the "**Total**" cells by typing in desired amounts.

Clerk of the Board

QUICK REFERENCE

Step 4c

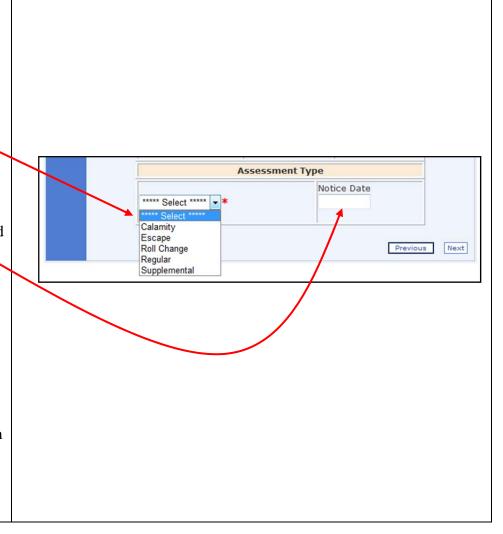
On the **Property** Information screen, Assessment Type section you will need to:

Select the **Assessment Type** from the assessment type pull down menu. (REQUIRED)

Click on the **Notice Date** and enter notice date in the following format MM/DD/CCYY (OPTIONAL)

Click on **Next** button to proceed to the Property Information screen

To return to the **Parcel Information** screen, click on the **Previous** button



Step 5

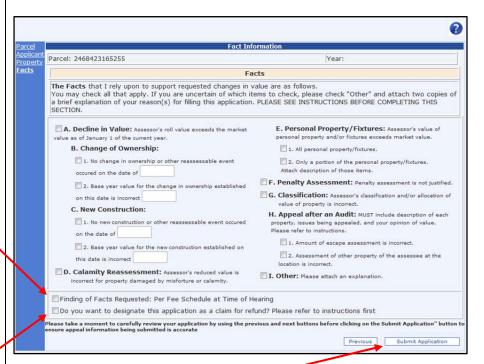
On the appeal **Facts** screen, you will need to select any and all facts (A. thru I.) that are applicable to the appeal being submitted. At least one explanation must be selected. (*REOUIRED*)

Click on the "Finding of Facts Requested" checkbox if you wish to receive the finding of facts for the appeal being submitted. (OPTIONAL)

Click on the "**Do you want** to designate this application as a claim for **Refund?**" checkbox as desired. (*OPTIONAL*)

Click on "Submit Application" button to submit and print the application

To return to the **Fact Information** screen, click on the **Previous** button



*Note: It is strongly recommended that you take a moment to review the information on the application for accuracy before clicking on the "Submit Application" button. Once the application is submitted, YOU WILL NOT BE ABLE TO EDIT any information.

Step 6

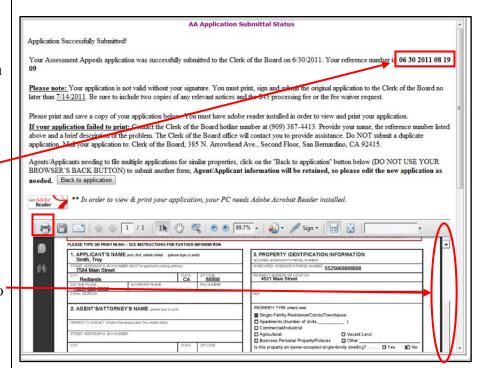
On the **AA Application Submittal Status** screen you see a confirmation that your appeal was successfully submitted.

Please make note of the **Reference Number** for future reference.

On the lower portion of the screen you will see a PDF version of the application. You may use the scroll bar to review the application.

To print the application to your local printer, click on the "**Printer**" icon. (*REQUIRED*)

Online Assessment Appeal Application process is now complete.



*Note: Please remember to attach the \$45 processing fee or the fee waiver request to your assessment appeal application.

If you identify any errors and need to amend the application, or if the application fails to print, please contact the Clerk of the Board hotline number at (909) 387-4413.

Step 6a

Submitting Multiple Applications

Agents/Applicants needing to file multiple applications for similar properties, click on the "Back to application" button to submit another form. DO NOT USE YOUR BROWSER'S BACK BUTTON.

*Note: Using the "Back to application" button will retain the Agent/Applicant information for the new application. Please edit the new application as needed.

